# Probationary or Off Cycle Performance Management Workflow-30 Day Cycle



#### Employee Initiates Review

—5 Days≯

1) Employee & Supervisor receives email notification to start the review process

2) Completes
Self Review
\*Goals
\*Job Duties

\*Performance

3) Submits to Supervisor (Direct Manager)

#### HARD STOP



#### Supervisor Review

—7 Days→

1) The supervisor completes employee review
2) They may reopen the review back to Employee (Must communicate with that individual if a step is reopened, because there is NO system generated notification.)

OR Submits to Indirect

Manager



#### Indirect Manager Sign Off

—7 Days→

Reviews evaluation; Signs off OR reopens a step which sends the review back to any previous step for revision. Must communicate with that individual if a step is reopened, because there is NO system generated notification.





#### Supervisor Presentation

—5 Days→

Supervisor and Employee meet to discuss performance evaluation; Supervisor enters date meeting occurred into the system and submits the review to advance the next step



#### Employee Sign Off

—3 Days→

Employee enters system and signs off that their review is complete. If the employee does not sign off, the supervisor should document somewhere that they refused to do so in their comments or by uploading an attachment.

 Employees have the option to upload additional information as an attachment within 30 days of the review.

3) If Employee or Supervisor uploads attachment(s), please contact HR, as HR cannot see these in the system, and should obtain a copy.



#### Supervisor Sign Off

—2 Days→

The Supervisor enters their electronic signature in the review. Should the employee refuse to sign, there is a box where the supervisor can make a notation.



### Complete Evaluation

The review becomes part of the employee's permanent record & HR will place a 2<sup>nd</sup> electronic record in the ECM Employee file (details still being worked out)

## Co-Planner Optional

May make comments; Care should be taken to ensure the Supervisor and Co-Planner understand which one is final approver.

#### **Key Terms/Considerations**

- 1) Reopening a step moves the review back to any previous step. There are 6 steps in the review process. No system generated email will occur when this happens; the individual taking this action should communicate with the other party accordingly.
- 2) Reviews expire 30 days after they start, no matter which step they are at in the process. HR may re-initiate the review. When a re-initiation occurs, HR will send a personal email to the Employee, Supervisor, and In-Direct Manager.
- 3) A Hard Stop is when the review will not move to the next step unless the person at that stop takes the required action (Supervisor). The review will continue to move to the next step on all other steps that are not a hard stop, even if the step is not complete.

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